

The Department of Procurement (the “DOP”)  
on behalf of the  
*Department of Human Resources*

## FC-7936, Employee Benefits



**Presentation Made By: Krista A. Morrison, Esq., Contracting Officer**

Wednesday, January 14, 2015  
Location: Old City Council Chambers  
Time: 11:00 am



# FC-7936, Employee Benefits

- ▶ **Welcome and Introductions**
  - Krista A. Morrison, Esq., Contracting Officer
- ▶ **Ethics Department**
  - Ms. Nina Hickson, Ethics Officer
- ▶ **Enterprise Risk Management**
  - Mr. Jimmy Porter, Risk Management Analyst
- ▶ **Office of Contract Compliance**
  - Mr. Bruce Bell, Senior Contract Compliance Manager
- ▶ **User Department: Department of Human Resources**
  - Ms. Yvonne Yancy, Commissioner of Human Resources
  - Mr. Louis Amis, Employee Benefits Director
- ▶ **Closing: Department of Procurement**
  - Krista A. Morrison, Esq., Contracting Officer



# Be Mindful of...

- **Prohibited Contacts**
- **Non-Authoritative Statements**
- **Plan Holders vs. Attendees at Pre-Conference**
- **Last Date for Addendum Questions:**
  - **Friday, January 16, 2015 1:00 p.m. (eastern)**
- **Proposal Due Date:**
  - **Wednesday, February 25, 2015, 2:00 p.m. (eastern)**
- **Oral Interview Sessions (*at City's discretion*):**
  - **March 11-13, 2015**



# Minimum Qualifications

Each Proponent team member (Service Provider Key Personnel) shall have a minimum of seven (7) years' experience within the last ten (10) years in employee benefits.



# City of Atlanta Ethics Office

**Ms. Nina Hickson**  
Ethics Officer



# Office of Enterprise Risk Management

**Mr. Jimmy Porter**  
Risk Management Analyst



# Office of Contract Compliance and AWDA

**Mr. Bruce Bell**  
Senior Contract Compliance Manager  
**Ms. Shirley Harris**  
Project Coordinator for First Source

# Department of Human Resources



## ▶ Introduction of Department's Business Objectives

- Project Manager: **Mr. Louis Amis**, *Employee Benefits Director*

## ▶ Opening the Floor for Questions & Answers

- **(Statements Made in this Forum Today are Not Authoritative)**

*All questions and responses provided are not considered authoritative until placed in writing to the appropriate point of contact within DOP, Krista A. Morrison, Esq., Contracting Officer. She will ensure that a subsequent addendum is issued to all Plan Holders of record.*



# Contents of Proposals



- ▶ **Proposals should be inclusive of :**

## **I. Informational Proposal**

- ▶ **Volume I - Information drafted by Proponent**
  - Executive Summary;
  - Organizational Structure;
  - Resumes of Key Personnel;
  - Overall Experience; and
  - Management Plan.
- ▶ **Volume II - Required Submittal Forms (Forms 1-9)**
- ▶ **Volume III - Responses to Questionnaires and applicable Attachments**

**Proponents must submit one (1) stamped “original” and ten (10) copies of the Informational Proposal.**

## **II. Cost Proposal - Exhibit A.1** (forms provided on the USB drive)

**Proponents must submit one (1) stamped “original” and ten (10) copies in a separate sealed envelope.**

# Appendix E – Additional Information and Required Submittals



## INSTRUCTIONS

FC-7936 Appendix E-1 Questionnaire - Microsoft Word

References Mailings Review View Acrobat

Times New Roman 11

**APPENDIX E**  
**ADDITIONAL REQUIRED INFORMATION AND SUBMITTALS**

**INSTRUCTIONS**

**A. Questionnaires**

ALL proponents should complete the **Questionnaire Checklist** and then complete the appropriate sections of the Questionnaire for which a “Yes” response was answered on the Checklist. Answer questions directly. Where you do not want to provide an answer, indicate so (e.g., not applicable, no response.). A response to a narrative question should not be more than two to three paragraphs long. Responses should be placed in **Volume III**.

Do not answer a question by referring to the answer of a previous question. Restate it or copy the previous answer under the new question. If, however, the question asks you to provide a copy of something, you may indicate where this copy can be found by labeling the document as an attachment/appendix number, letter or heading.

**B. Attachments**

The following attachments, as applicable to each insurance product your organization is proposing, should be placed in **Volume III**, identifying the product and labeled as follows:

1. Call volume and Telephone inquiries:
  - a. Sample reports of how company intends to tracking call volume, as well as, performance targets. **Label as Attachment #1A**

# Next Anticipated Procurement Steps – After Proposal Due Date



## ▶ **Step 1: DOP Will Review Proposal(s) for Responsiveness (within two business days)**

- Form 1 - Illegal Immigration Reform and Enforcement Act Forms (**IIREA**)
- Form 2 - Disclosure Form and Questionnaire
- Form 3 - Proponent Financial Disclosure
- Form 4.1 - Certification of Insurance Ability
- Form 4.2 - Certification of Bonding Ability
- Form 5 - Acknowledgement of Addenda
- Form 6 - Proponent Contact Directory
- Form 7 - Reference List
- Form 8 - Proposal Bond (**not applicable**)
- Form 9 - Required Submittal Checklist
- Appendix A - Office of Contract Compliance Forms
- Appendix E - Responses to Questionnaires and Applicable Attachments

## ▶ **Step 2: DOP Will Submit **ONLY** Responsive Proposals to Internal City Stakeholders to Review for Responsibility:**

- ✓ **Office of Contract Compliance** to Review Appendix A Submittals
- ✓ **Office of Enterprise Risk Management** to Review Form 4: Proponents Financial Disclosure Statements
- ✓ **Department of Human Resources** to Review for responsibility, and *assessment of a need* for Oral Interviews and Subsequent Scheduling of Collaborative Evaluation Session(s)

# Reminders

## ▶ Addendum Deadline:

○ **Friday, January 16, 2015, 1:00 p.m. (eastern)**

**\*\*QUESTIONS RECEIVED THEREAFTER MAY NOT BE CONSIDERED\*\***

## ▶ Proposal Due Date:

○ **Wednesday, February 25, 2015, 2:00 p.m. (eastern)**

**\*\*ABSOLUTELY NO PROPOSALS WILL BE ACCEPTED AFTER 2:00 P.M.\*\***



**Primary Point of Contact: Krista A. Morrison, Esq., Contracting Officer**

**Email: kamorrison@atlantaga.gov**

**Direct Phone Number: 404-865-8709**